



EXECUTIVE COMPUTING

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Software helps sales managers track prospects

Some of the smartest new software products are deceptively simple — they provide *sample applications* that help people get started quickly using personal computers.

A perfect example is "Sales Prospect Tracking," a program from the publishers of PowerBase, one of the best data-base systems available for the IBM PC and IBM PC-compatible computers.

This inexpensive add-on program to PowerBase offers an easy-to-use base or "template" and allows you to build your own customized application on top of it. So instead of engaging a high-priced programmer to sit down and "invent" a sales management system for your company, a sales secretary merely adjusts the pre-written program to your specific needs.

Not only can this method save countless hours of reinventing the wheel, but it inspires the use of better management techniques as well. Many features proven to work in other companies have already been built in.

Borrowing good ideas

Here are some of the features of the "Sales Prospect Tracking" template that make it so attractive:

- ✓ It helps you maintain an up-to-date file of all prospective clients, including the details of all sales calls, telephone conversations and actions on the prospect's behalf.
- ✓ It monitors sales reps' performances individually, as well as collectively within sales regions, by constantly comparing sales quotas with actual performance.
- ✓ It measures the effectiveness of marketing and sales programs by territory and region.

The central file in the program is the PROSPECT file, which is used to maintain basic data about each sales lead. Each of your company's

prospects is listed in a separate record in the file, shown on a separate screen. To start out, your sales secretary merely fills in the basic data about each sales lead — client name, address, sales rep, etc. If the record format provided does not fit your needs exactly, it's easy to add fields or make adjustments using the menu-driven PowerBase commands.

One advantage of building your sales data base with PowerBase is that you can "zoom" (switch quickly) from one related file to another very easily. The Sales Prospect Tracking program provides you with a whole series of files that are already related to one another. Included is a LEAD file which tells how each lead was generated, a SALESREP file containing information about each sales rep, a QUOTA file with monthly quotas and performance ratios for each sales rep, and a CALL file with a record for each sales call made.

In addition, the program is set up to generate reports to keep track of each prospect for sales personnel and management. As with the predefined files, you can easily change the reports to suit your company's specific needs.

Making the program work

As with the PROSPECT file, the ongoing task of the sales secretary would be to update all the other files on a regular basis — again, adding fields or making adjustments in the record format as necessary.

This task is actually much easier than it sounds, and it has the added advantage of consolidating all the company's (or department's) sales information in one spot. The best way to make it work is for each salesperson to simply dictate the key information about each sales call or new prospect into a hand-held micro-cassette machine that is carried all the time. Note-taking is avoided and each salesperson's time is best spent — with potential clients rather than working with the computer.

The sales secretary's role is crucial with this program, since he or she must constantly input the new data and provide current "follow-up reports" every day, to each salesperson. But the benefits are great. The program could easily generate the many letters that typically take up much of the sales secretary's time — thanking prospects and providing further information promised by the salespeople.

Commitment required

Above all, however, the program is only a "tool" to help manage sales prospects. Just like "owning" a computer, just "acquiring" software is not enough to make it perform effectively in your company. Commitment on the part of the sales manager, the sales secretary and all sales personnel is required to make it work.

To start out, you'll need an IBM PC-XT (with a 10 Megabyte hard disk) or compatible computer with 512 Kilobytes of memory, a printer, the PowerBase data base program (list \$349), and the "Sales Prospect Tracking" program (\$29.95). Then, and this is the hard part, you'll have to devote the time and energy necessary to input all your current client and prospect information into the computer. This task alone scares away most people! But let me assure you, as with most new computer projects, if you take the time to do it right the rewards will make it all worthwhile.

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